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European airports handle an additional 660 million passengers in the first half of 2022

Brussels, 27 July 2022: European airport trade body ACI EUROPE today released its air traffic report covering the month of June, as well as Q2 and the first half (H1) of 2022.

EXPONENTIAL PASSENGER GROWTH LED BY EU+ MARKET IN H1

Passenger traffic in the European airport network jumped by **+247%** in **H1 2022** compared to the same period last year – resulting in airports across the continent **handling an additional 660 million passengers**.

The increase was predominantly driven by **international traffic (+381.2%)** rather than **domestic traffic (+88.5%).** It was also very much concentrated in the **second quarter (+245.9%)** – following the easing as of March of the Omicron-related restrictions for travel within Europe as well as for an increasing number of external markets.

Airports in the **EU+ market**[1] saw by far the biggest jump in passenger traffic in **H1** at **+348.9%** - resulting in their passenger volume increasing to 635 million from 140 million compared to last year. Within the bloc, airports in Ireland (+1125%), the UK (+833%), Slovakia (+842.2%), Hungary (+784.8%) and Denmark (+611.8%) all experienced extraordinary increases.

Meanwhile, there was more moderate though nonetheless still significant growth in passenger traffic at airports across the **rest of Europe[2]** in **H1** at **+58.3%**.

This reflects the fact that those markets had generally been subjected to less stringent restrictions both locally and for travel throughout the pandemic and had started recovering earlier compared to the EU+ market. This was notably the case for airports in Turkey (+96.3%) but also in smaller markets such as Armenia (+75.6%) and Kazakhstan (+11.5%) - with airports in Israel (+328.9%) being the exception and following a dynamic similar to the EU+ airports. The performance of the non-EU+ market also reflects the impact of the war on Ukrainian airports - with international sanctions weighing on airports in Russia (-3.6%) and Belarus (-16.7%).

Olivier Jankovec, Director General of ACI EUROPE commented: "*These numbers speak for themselves. If COVID-19 caused an unprecedented collapse in passenger traffic for Europe's airports, the rebound we have experienced this Spring - especially in the EU+ market - is equally extraordinary. The fact that volumes across the continent still remained -28.3% below pre-pandemic levels for the first half of the year should not eclipse the sheer and unprecedented unleashing of pent-up demand that has occurred since March.*"

[1] EU, EEA, Switzerland and UK.
[2] Albania, Armenia, Belarus, Bosnia & Herzegovina, Georgia, Israel, Kazakhstan, Kosovo, Northern Macedonia, Moldova, Montenegro, Russia, Serbia, Turkey, Ukraine and Uzbekistan.

JUNE 2022 CLOSEST TO FULL PASSENGER TRAFFIC RECOVERY

June 2022 saw **passenger traffic** across the European airport network making further gains – with the month closing at **-17.4% against pre-pandemic (June 2019) levels**. This is the strongest monthly performance since the last pre-pandemic reporting in February 2020.

In a reversal of the situation that prevailed throughout the pandemic the **EU+ market** (**-16.6%)** outperformed the **rest of Europe (-21.7%)** in June when compared to pre-pandemic (2019) levels.

A closer look at the performance of national markets in the EU+ market shows the recovery continues to be driven by leisure & VFR demand, as evidenced from the results achieved by airports in countries heavily relying on tourism:

- Airports in Greece (+1.8%) and Luxembourg (0%) were the only ones having fully recovered their pre-pandemic (2019) passenger traffic volumes in June. Airports in Portugal (-2.9%) came close to a full recovery, followed by those in Lithuania (-7.5%) and Norway (-9.9%).

- At the other end of the spectrum, airports in Slovenia (-45.7%), Finland (-36.8%), Bulgaria (-34.1%), Czechia (-33.3%) and Latvia (-28%) struggled to recover more dynamically, notably due to the impact of the war in Ukraine and related international sanctions on Russia.

- Amongst the largest EU+ markets, airports in Spain (-10.8%) and Italy (-12.7%) posted the best results, followed airports in France (-17.6%), the UK (-19.2%) and Germany (-27%).

In the rest of Europe, the best results in June came from airports in the smaller markets of Albania (+59.3%), Bosnia-Herzegovina (+29.9%), Kosovo (+24.8%), Armenia (+16.7%) and Kazakhstan (+13.1%), which far exceeded their pre-pandemic (2019) levels.

Airports in North Macedonia (-5%) and Serbia (-8.7%) came close to full recovery, followed by those in Turkey (-12.4%). Airports in Ukraine have lost all passenger traffic (-100%), with international sanctions impacting the performance of airports in Russia (-27%) and Belarus (-62.1%), as well as those in Montenegro (-60.9%), Georgia (-32.5%) and Moldova (-28.6%).

The Majors (top 5 European airports: -17%) and more generally larger airports kept underperforming **smaller and regional airports[3] (-6.6%)** in June, when compared to pre-pandemic (2019) passenger traffic level. This reflects continued travel restrictions on selected Asian markets – in particular in China. However, the Majors still experienced exceptional volume increases compared to last year:

- Istanbul (-1.7% vs. 2019 |+ 115.4% vs 2021) kept leading the league in absolute terms in June, having nearly fully recovered its pre-pandemic passenger volumes.

[3] Airports with less than 5 million passenger per annum (2019).

- London-Heathrow came second in absolute terms (-17.3% vs 2019 | +526% vs. 2021), with the largest volume increase compared to last year.

- The British hub was followed by Paris-CDG (-21.2% vs. 2019 | + 222.9% vs. 2021), Amsterdam-Schiphol (-19.5% vs. 2019 | + 211.8%).

Amongst other large and hub airports, results were far from uniform in June:

- Tourism-fuelled Palma de Mallorca (-3.6%), Lisbon (-6.6%) and Athens (-6.8%) were closest to fully recovering their pre-pandemic (2019) traffic levels.

- Paris-ORY (-10.4%) benefited from its domestic and intra-European focus, while the reliance of Dublin (-11.7%) on the transatlantic market also boosted its results.

- Conversely, Brussels (-28.2%) was heavily impacted by industrial action, and in Helsinki (-36.8%) the exposure to the Asian market with routings that used to involve overflying Russia limited its recovery.

Meanwhile, a number of regional airports serving popular tourism destinations and/or relying on Low Cost Carriers exceeded their pre-pandemic (2019) traffic levels in June, including: Santorini (+72.5%), Tirana (59.3%), Zadar (+39.1%), Funchal (+27.9%), Mikonos (+12.9%), Kerkyra (+12.8%), Kaunas (+8.1%), Menorca (+6.5%), Billund (+5.5%) , Olbia (+4.7%) and Bergamo (+1.1%).

FREIGHT & MOVEMENTS

Freight traffic across the European airport network made limited gains in **H1** at **-0.8% compared to the same period last year** – with EU+ airports at -0.2% and those in the rest of Europe at -5.7%.

This reflects the wider impact of the war in Ukraine on supply chains, which sent freight traffic on a downward trend as of last February – with the month of **June** closing at **-4.5**% (-3.8% at EU+ airports and -9.2% for airports in the rest of Europe). This has not erased all gains made in the recovery: freight traffic in H1 remained +5% above pre-pandemic (2019) levels.

Aircraft movements increased by **+127.9% in H1** and by **+84.1% in June** compared to the same periods last year.

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ACI EUROPE is the European region of Airports Council International (ACI), the only worldwide professional association of airport operators. ACI EUROPE represents over 500 airports in 55 countries. Our members facilitate over 90% of commercial air traffic in Europe. Air transport supports 13.5 million jobs, generating €886 billion in European economic activity (4.4% of GDP). In response to the Climate Emergency, in June 2019 our members committed to achieving Net Zero carbon emissions for operations under their control by 2050, without offsetting.